



**STATE OF WISCONSIN**  
Department of Safety and Professional Services  
1400 E Washington Ave.  
Madison WI 53703

**Governor Scott Walker      Secretary Dave Ross**

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## DSPS PROJECT CHARTER

Project Name: Electronic Plan Review	Team Leader: John Spalding
Date Chartered: 6/1/2012	Expected Completion Date: 10/1/2012

<b>PROJECT GOALS</b>
To increase customer satisfaction and reduce barriers for staff through the development of an electronic process for the submission, review, and storage of technical plans.
<b>MEASURES</b>
<ul style="list-style-type: none"><li>• Increased accessibility to plan review appointments by 25%</li><li>• Reduced operational costs through the elimination of storage and supply costs associated with intake and retention of paper documents/files by 25%</li><li>• Increased resource utilization due to the development and use of a robust document management system to reduce lost time and non-value added activities to 85%</li><li>• Maximize the use of floor space for value-added activities.</li></ul>
<b>ISSUES TO BE ADDRESSED</b>
<ul style="list-style-type: none"><li>• Delays in scheduling and review of submitted plans.</li><li>• Organization of filing systems associated with plan review.</li><li>• Centralized access to plan review status and approvals.</li></ul>
<b>EXPECTED RESULTS</b>
<ul style="list-style-type: none"><li>• Standard operating procedures for electronic plan review and storage.</li><li>• Effective use of existing space due to reduction of filing systems.</li></ul>
<b>PROJECT TEAM MEMBERS</b>
<ul style="list-style-type: none"><li>• John Spalding: Project Lead</li><li>• Laura Hasburgh: Plan Reviewer</li><li>• John Pierce: Plan Reviewer</li><li>• Tim Lamb: Plan Reviewer</li><li>• Teresa Black: Inspector</li><li>• Char Martin: Inspector</li><li>• Debbie Smrcina: Plan Entry</li></ul>
<b>SUPPORT/RESOURCE PEOPLE</b>

- IT/DET
- Senior Management
- External Stakeholders

#### **RESPONSIBILITIES AND BOUNDARIES**

- Plan Review team will receive initial training and developing documentation to deliver additional training to remaining staff.
- Inspector team will give feedback on processes and procedures established for field work.
- Team Lead and Senior Management will handle on procurement aspects.
- External Stakeholders have agreed to work with Plan Review Team on this pilot project.



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### DSPS PROJECT CHARTER

<b>Project Name:</b> Online Licensure Application System (OLAS)	<b>Team Leader:</b> Kris Hendrickson
<b>Date Chartered:</b> 4/18/2012	<b>Expected Completion Date:</b> 8/31/2012

#### PROJECT GOALS

To improve the licensure application process for new nursing school graduates through forming a partnership with nursing schools and to lay a foundation to expand the process to other professions.

#### MEASURES

- Reduction in licensure processing time
- Increased staff productivity and capacity
- Improved customer service to stakeholders
- Lessen errors from inaccurate or incomplete data

#### ISSUES TO BE ADDRESSED

- Identify specific tasks that may be delegated to nursing schools
- Selection of nursing schools to partner with and establishing MOUs
- Understand the statutory requirements for forms and processes
- Determine technology needs

#### EXPECTED RESULTS

- Processes and guidelines for online licensure for applicants, schools, and agency staff
- A web-based online application solution that can be modified for other professions
- MOU's with selected nursing schools
- Reporting mechanism to ensure compliance with program requirements

#### PROJECT TEAM MEMBERS

- Kris Hendrickson
- Angie Herl
- Gene Hilpert
- Craig Lovell

#### SUPPORT/RESOURCE PEOPLE

- Division of Board Services staff members
- Division of Professional Credential Processing staff members
- IT/DET

- WI Board of Nursing
- Concordia University
- Lakeshore Technical College

#### **RESPONSIBILITIES AND BOUNDARIES**

- This project will focus solely on establishing an online licensure application process for the nursing profession. The process will be expanded following a successful implementation of the project.
- The Division of Board Services facilitates discussion and interaction with the WI Board of Nursing.
- Concordia University and Lakeshore Technical College were selected as the pilot schools for this process.



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### DSPS PROJECT CHARTER

<b>Project Name:</b> Paperless Office - Phase I	<b>Team Leader:</b> Chad Koplien
<b>Date Chartered:</b> 6/29/2012	<b>Expected Completion Date:</b> 9/1/2012

<b>PROJECT GOALS</b>
To promote operational effectiveness, a productive use of space, simplified processes, and to maximize staff resources through the phased implementation of a paperless office protocol.
<b>MEASURES</b>
<ul style="list-style-type: none"><li>• Reduction in operational costs</li><li>• Increased staff productivity and capacity</li><li>• Improved customer service to stakeholders</li></ul>
<b>ISSUES TO BE ADDRESSED</b>
<ul style="list-style-type: none"><li>• Understand our statutory requirements for retention of documents</li><li>• Develop guidelines for phased approach for implementation of paperless initiatives</li><li>• Produce an adjusted floor plan to accommodate elimination of filing cabinet space</li></ul>
<b>EXPECTED RESULTS</b>
<ul style="list-style-type: none"><li>• Elimination of storage and supply costs associated with the retention of paper documents/files.</li><li>• Agency standards and guidelines addressing the retention of documents</li><li>• Maximize the use of floor space for value-added activities</li></ul>
<b>PROJECT TEAM MEMBERS</b>
<ul style="list-style-type: none"><li>• Chad Koplien</li><li>• Angela Herl</li><li>• Kelli Kaalele</li><li>• Katie Koschnick</li><li>• Michael Berndt</li><li>• Martha Zydowsky</li></ul>
<b>SUPPORT/RESOURCE PEOPLE</b>
<ul style="list-style-type: none"><li>• Division staff members</li><li>• IT/DET</li><li>• State Records Center</li></ul>

#### **RESPONSIBILITIES AND BOUNDARIES**

This phase of the project will deal with removing unnecessary documents from file cabinets and storage rooms located within current agency offices. The next phase of the project will focus on implementing a document management system.



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### DSPS PROJECT CHARTER

<b>Project Name:</b> Paperless Office - Phase 2	<b>Team Leader:</b> Chad Koplien
<b>Date Chartered:</b> 6/29/2012	<b>Expected Completion Date:</b> 12/1/2012

<b>PROJECT GOALS</b>
To promote operational effectiveness, a productive use of space, simplified processes, and to maximize staff resources through the phased implementation of a paperless office protocol.
<b>MEASURES</b>
<ul style="list-style-type: none"><li>• Reduction in operational costs</li><li>• Increased staff productivity and capacity</li><li>• Improved customer service to stakeholders</li></ul>
<b>ISSUES TO BE ADDRESSED</b>
<ul style="list-style-type: none"><li>• Intake and distribution of incoming mail</li><li>• Electronic routing and retention of documents</li><li>• Ineffective electronic storage and archiving</li></ul>
<b>EXPECTED RESULTS</b>
<ul style="list-style-type: none"><li>• Processes and guidelines for the intake, routing, and retention of all documents</li><li>• Create a sustainable document management system for storage of documents</li><li>• Reduced operational costs through the elimination of storage and supply costs associated with intake and retention of paper/documents</li><li>• Reduce errors in routing and loss of documents</li></ul>
<b>PROJECT TEAM MEMBERS</b>
<ul style="list-style-type: none"><li>• Chad Koplien</li><li>• Angela Herl</li><li>• Kelli Kaalele</li><li>• Katie Koschnick</li><li>• Michael Berndt</li><li>• Martha Zydowsky</li></ul>
<b>SUPPORT/RESOURCE PEOPLE</b>
<ul style="list-style-type: none"><li>• Division staff members</li><li>• IT/DET</li></ul>

- State Records Center

#### **RESPONSIBILITIES AND BOUNDARIES**

This phase of the project will deal with creating processes related to the intake, routing, and retention of documents including incoming paper mail. The project will focus on creating a robust and sustainable document management system.





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### DSPS PROJECT CHARTER

Project Name: Practice Question Procedure	Team Leader: Katie Koschnick
Date Chartered: 6/25/2012	Expected Completion Date: 8/31/2012

#### PROJECT GOALS

Clarify the department's role as a regulatory agency and ensure that all documents interpreting, clarifying, or explaining regulatory statutes and rules are identified and, if necessary, subject to the rule-making process. Furthermore, these documents should be standardized to ensure that all members of the public have equal access to such information developed by the department.

#### MEASURES

- Standardization of responses to practice questions
- Responses developed will adhere to strict recitation of applicable law
- All documents that interpret, clarify and explain applicable law will be submitted to the Governor's Office of Regulatory Compliance as mandated by Executive Order # 50
- Department legal counsel will be better equipped to focus on tasks outlined in position descriptions, e.g. providing support to boards, as they will spend less time performing legal research and preparing memoranda that address fact-specific inquiries, a task not properly within the role of department legal counsel

#### ISSUES TO BE ADDRESSED

- Credential holders and members of the public at large submit a large volume of questions to legal counsel about the scope of practice
- Legal counsel develop individualized responses to practice questions that contain assurances that have the potential to give the credential holder a false sense of security, as these assurances may not hold weight in a disciplinary or other legal action
- Legal counsel develop individualized responses to practice questions that contain statements and assurances that are given weight and considered "official interpretation" of statute or rule but have not been properly vetted through the appropriate legislative procedures (e.g. rule-making process)
- Individualized responses developed by legal counsel vary, as no mechanism exists for ascertaining whether a particular inquiry has been addressed in the past, this results in inconsistent information disseminated to individual members of the public by the department. Furthermore, as many of these inquiries address unclear areas of the law, variation among responses is prevalent
- The Executive Branch of government acts in an improper manner by formulating policy, an action reserved for the legislative branch except where specifically delegated to an agency or board by rule (in which case rule making procedures must be followed)

### **EXPECTED RESULTS**

- Consistency among responses drafted by department legal counsel
- All answers to practice questions will have been thoroughly vetted and approved by the department (and board, if necessary) and posted to the department website for public view
- Responses that are developed will be void of all interpretive language that is not directly tied to a statute or rule; this puts the onus on credential holders to interpret the laws and hire individual legal counsel if necessary to do so
- The department and boards, as an extension of the Executive Branch, adheres to its role of implementing and executing statutes and rules within the parameters set forth by the legislature

### **PROJECT TEAM MEMBERS**

- Katie Koschnick, Division Administrator in Division of Board Services
- Kim Wood, Supervisor in Division of Board Services
- Michael Berndt, Chief Legal Counsel
- Tom Ryan, Executive Director for the Medical Board

### **SUPPORT/RESOURCE PEOPLE**

- Division of Board Services Legal Counsel staff
- Department Executive Assistant

### **RESPONSIBILITIES AND BOUNDARIES**

- All practice questions that come into the department will be filtered into an email inbox belonging to the legal counsel affiliated with the relevant profession
- Legal counsel will have the responsibility to exercise discretion in identifying questions that call for individual legal advice and / or policy development
- Legal counsel will have the responsibility to exercise discretion in identifying questions that necessitate a response, such as requests for clarification of recently passed statutes or rules. In developing a response to these questions legal counsel will work with department staff and, if applicable, the professional board members to craft an accurate response
- Responses that are drafted will be sent to the Governor's Office of Regulatory Compliance, if necessary, and posted on the department's website to prevent variation among responses and ensure that all members of the public have access to the same information disseminated by the department



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## DSPS PROJECT CHARTER

<b>Project Name:</b> Case Quality Review and Intervention	<b>Team Leader:</b> Greg Raube
<b>Date Chartered:</b> 08/02/2012	<b>Expected Completion Date:</b> November 1, 2012

### PROJECT GOALS

- Limit the number of cases in which significant division resources are expended when either minor discipline is imposed or no disciplinary action is undertaken.
- Assure that division resources are allocated appropriately.
- This review will help to limit the number of cases that fail to meet the division timelines.
- Assure that "high profile" cases are identified by division managers.

### MEASURES

- Improved customer service to stakeholders
- Increased efficiency of staff resources

### ISSUES TO BE ADDRESSED

Since the division has approximately 2000 cases at any given time, it is impossible for management to be aware of what is happening with all cases. This review will help management identify potential problems early on, and allow them to make decisions with regard to those problems earlier in the process.

### EXPECTED RESULTS

Once cases are identified for review, a meeting will be scheduled with all division managers/supervisors. The staff members assigned to the cases under review will be scheduled to appear at those meetings to give management a status update on the case, what the next planned steps are for the case, what outcome is being sought, and what additional resources will be necessary to conclude the case.

### PROJECT TEAM MEMBERS

Division of enforcement managers/supervisors.

### SUPPORT/RESOURCE PEOPLE

It is critical that a database search feature be created to develop a report that can be used to query cases to identify them for review. Without this report, staff members can identify such cases for review themselves, but this will allow some cases

to be missed and also it would be possible for a staff member to take steps to make sure a case does is not considered for quality review.

### **RESPONSIBILITIES AND BOUNDARIES**

This project is a proposal to have division management conduct quality reviews of particular cases to assure that the appropriate level of resources are being expended on such cases and that appropriate outcomes are being achieved. Cases will be identified for management review when over 40 hours of staff time have been billed to a case, when two thirds of the timeline time for the case has passed without resolution, if there has been no significant billing on a case for a period of three months, and/or a case is identified as a "high profile" case. When any one of these criteria is met, the case will be targeted for management review. The criteria for defining a "high profile" case can include considerations such as media or legislative interest in the case, serious potential harm to the public, an outcome that may impact the practice of the particular profession, and other criteria.

The quality review of cases meeting the criteria will involve the division managers/supervisors meeting with the staff assigned to those cases to determine the current status of such cases, what is the plan moving forward, and if the intended result of the cases justifies the expenditure of more resources. The intent of this review is to assure that the resources expended on a case are justified by the outcome.



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### DSPS PROJECT CHARTER

<b>Project Name:</b> Standardization of DOE Reports	<b>Team Leader:</b> Janie Brischke
<b>Date Chartered:</b> 08/02/2012	<b>Expected Completion Date:</b> February 28, 2013

#### PROJECT GOALS

To develop a standard set of reports to be used by Division of Enforcement for management of programs, metrics, staff and responses to records requests, boards and other stakeholders.

#### MEASURES

- Consistency
- Increased efficiency of staff resources
- Quality/accurate data

#### ISSUES TO BE ADDRESSED

- Lack of accessible data to achieve goals
- Lack of ability for staff to manage their caseloads effectively
- Inefficient use of staff time

#### EXPECTED RESULTS

- Managers and staff are able to determine if metrics are being met and identify potential problems early on.
- Increased efficiency
- Accurate reporting of data
- Timely responses to request

#### PROJECT TEAM MEMBERS

Janie Brischke  
DOE Supervisors

#### SUPPORT/RESOURCE PEOPLE

DET/IT

#### RESPONSIBILITIES AND BOUNDARIES

This project will focus on establishing a standard, easily accessible set of reports to address the issues identified.



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### DSPS PROJECT CHARTER

<b>Project Name:</b> Prompt resolution of cases before boards that meet infrequently	<b>Team Leader:</b> Jeanette Lytle
<b>Date Chartered:</b> 08/02/12	<b>Expected Completion Date:</b> March 1, 2013

#### PROJECT GOALS

- Reduce time to final resolution of DOE cases.
- To consider methods to resolve more promptly cases before boards that meet infrequently. One possibility could be to implement telephonic case closing meetings to be held between regular board meetings for boards who meet infrequently.

#### MEASURES

Measures include average time to final resolution of case from date final recommendation (informal, administrative warning or stipulation) is ready for consideration by the board.

#### ISSUES TO BE ADDRESSED

Many boards, particularly business boards, meet infrequently (anywhere from 2-5 times per year). This slows resolution of cases for which a DOE recommendation (informal, administrative warning or stipulation) is ready for Board consideration, and affects our ability to protect the public and to allow the respondent to know the proposed resolution has been accepted.

#### EXPECTED RESULTS

- A new procedure that allows more prompt consideration of case closings that does not require waiting for infrequent board meetings.
- Reduction of backlog, efficient resolution for Boards and professionals subject to discipline.

#### PROJECT TEAM MEMBERS

Jeanette Lytle, Heather Curnutt, Yolanda McGowan, Mike Berndt

#### SUPPORT/RESOURCE PEOPLE

Board Services, if the result involves telephonic case closing board meetings. Chief Legal Counsel, if the result involves delegating decisions between board meetings to DSPS.

#### RESPONSIBILITIES AND BOUNDARIES

Ways to decrease the time for a final recommendation as to resolution of a case to be considered by a board that meets infrequently.



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### DSPS PROJECT CHARTER

<b>Project Name:</b> Delegate handling of default orders to the Department	<b>Team Leader:</b> Heather Curnutt
<b>Date Chartered:</b> 08/02/2012	<b>Expected Completion Date:</b> October 1, 2012

#### PROJECT GOALS

Reduce time to issue default orders. To implement a delegation of default orders issued after a Respondent fails to answer a formal complaint and/or appear at a scheduling conference set by the ALJ to the Department, instead of requiring briefing and waiting for a proposed opinion and final decision and order from the ALJ.

#### MEASURES

- Reduce time to issue default orders.
- Reduce DOE costs incurred in obtaining default orders. This will result in lower costs assessed against the defaulting respondent.
- Quality of default orders will be controlled within DSPS.

#### ISSUES TO BE ADDRESSED

This will reduce the time spent to obtain resolution of these very simple types of orders, which will benefit the Respondents by reducing the costs assessed against them following entry of the order. It will also free prosecuting attorneys and DOE staff to work on other cases.

#### EXPECTED RESULTS

A new procedure whereby DHA ALJs orally grant oral motions for default, then immediately return jurisdiction for the case to DSPS, so that the written default order can be entered promptly.

#### PROJECT TEAM MEMBERS

Jeanette Lytle, Heather Curnutt, Sandy Nowack, Judge Nashold

#### SUPPORT/RESOURCE PEOPLE

We will only need to notify DHA and DOE staff of the new procedure so that they can follow it once it is in place.

#### RESPONSIBILITIES AND BOUNDARIES

The team will look at ways to reduce time to obtain default orders after default occurs. The team will not look at ways to improve efficiency for cases not in hearing.



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### DSPA PROJECT CHARTER

<b>Project Name:</b> Decrease time to obtain final order after formal complaint filed	<b>Team Leader:</b> Jeanette Lytle
<b>Date Chartered:</b> 08/02/2012	<b>Expected Completion Date:</b> January 1, 2013

#### PROJECT GOALS

To determine steps DOE can take to speed up the issuance of a proposed decision and to decrease incidence of variances, thereby allowing final orders to be issued more quickly.

#### MEASURES

- Reduce time to obtain proposed orders from DHA following filing of formal complaint.
- Reduce time to have proposed orders approved by regulatory authority (e.g., by improving quality of proposed order and reducing need for variance, perhaps by having DOE submit proposed orders for signature by the ALJ)
- Measures include average time to decision, which could be broken down by whether resolution is by default, by summary judgment or following hearing; and number of decisions in a specified time period.

#### ISSUES TO BE ADDRESSED

Increased timeliness in resolution of formal complaints.

#### EXPECTED RESULTS

A new procedure by which we work with DHA to decrease case processing time during the hearing process.

#### PROJECT TEAM MEMBERS

Jeanette Lytle, Mike Berndt, Chad Koplien, Judge Nashold

#### SUPPORT/RESOURCE PEOPLE

DHA staff

#### RESPONSIBILITIES AND BOUNDARIES

- The team will look at ways to reduce time to final resolution of a case in which a formal complaint has been filed.
- The team will not look at ways to improve efficiency for cases not in hearing.





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### DSPS PROJECT CHARTER

<b>Project Name:</b> Complaint Intake/screening and Monitoring/PAP merge (Complaint & Resolution Unit)	<b>Team Leader:</b> Patara Horn
<b>Date Chartered:</b> 08/02/2012	<b>Expected Completion Date:</b> 10/31/2012

#### PROJECT GOALS

To improve the efficiency of the intake/screening and monitoring/PAP process by combining the two (2) units under one supervisor.

#### MEASURES

- Reduce the time it takes to process incoming complaints
- Reduce the number of cases to be opened for investigation
- Relief current workload and stress level of monitoring/PAP staff
- Improve the ability of monitoring/PAP staff to enforce the orders/contracts in a timely manner
- Increased staff productivity and capacity
- Improved customer service to stakeholders
- Lessen errors from inaccurate or incomplete data

#### ISSUES TO BE ADDRESSED

- Identify unnecessary intake process that may be eliminated
- Update current policy/procedures regarding intake complaint process and monitoring of orders
- Identify third party vendor that may take over the monitoring of PAP participants
- Understand the statutory/code requirements for processes
- Determine technology/additional staff needs

#### EXPECTED RESULTS

- The implementation of new intake complaint policy/procedures regarding timeline and process
- The improved ICE monitoring with tickler system
- The monitoring of PAP by third party vendor
- Additional monitoring staff: minimum two (2) full-time monitors and one (1) half-time office support staff
- A reporting mechanism to ensure compliance with Board orders/PAP contracts

#### PROJECT TEAM MEMBERS

- Patara Horn
- Ashley Horton
- Janie Brischke
- Gene Hilpert (or other IT)

#### SUPPORT/RESOURCE PEOPLE

- Division of Enforcement management team
- Chief Legal Counsel
- IT/DET

- DOA purchasing unit
- Hazelden

#### **RESPONSIBILITIES AND BOUNDARIES**

- This project will focus on establishing the most efficient way to process complaints and reduce the number of cases opened for investigation; improving existing tracking system that will ensure compliance with Board's Order and PAP contracts; increasing the number of staff according to the number of caseloads.
- Hazelden will provide a non-commitment proposal for the monitoring of PAP